



Inventory Pick Wave Process

INV

QUICK REFERENCE GUIDE INV-43

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide step-by-step guidance of how to Create a Manual Pick Wave, Schedule a Pick Wave, Print a Pick Slip Report, Confirm Picking, and Confirm Shipping in the North Carolina Financial System (NCFS).

This QRG is to be used in conjunction with Web-Based Training (WBT) **INV103-Warehouse Staff** and Instructor Led Training (ILT) **INV105-Inventory Management** and **INV106-Warehouse Transactions** as well as **INV-14**, **INV-18**, **INV-34**, and **INV-35** found here: <https://www.osc.nc.gov/training/ncfs-help-documents>.

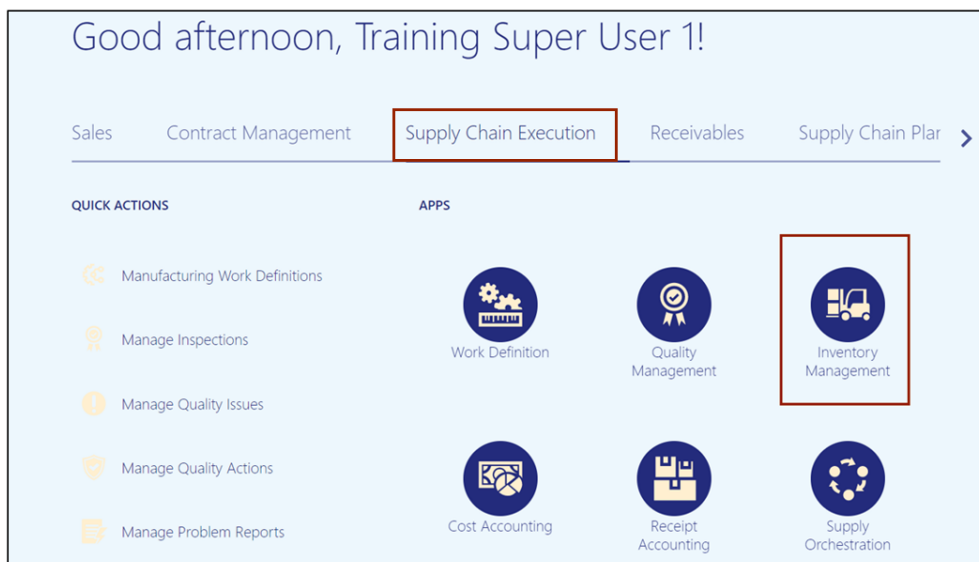
Introduction and Overview


This QRG covers the pick wave process for inventory agencies using NCFS. The pick wave process is used for Self-Service Procurement (SSP) orders for consumption or Transfer Orders for replenishment and warehouse movement. Not all transactions use the pick wave process, such as the NC Direct Issue miscellaneous transaction; see **INV-16** for more information found here: <https://www.osc.nc.gov/training/ncfs-help-documents>.

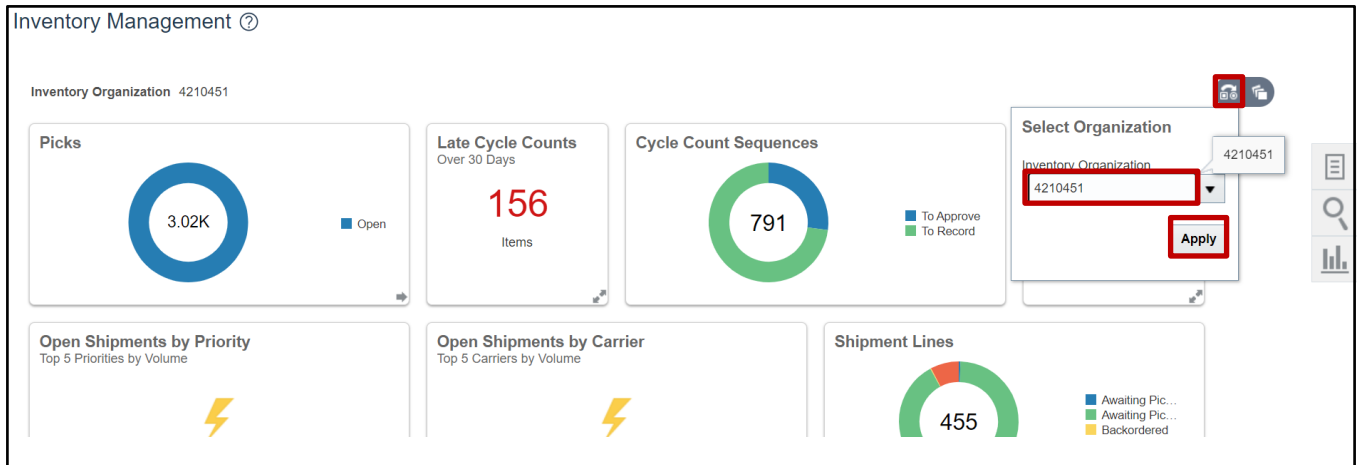
Create a Manual Pick Wave

To schedule a pick wave in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.

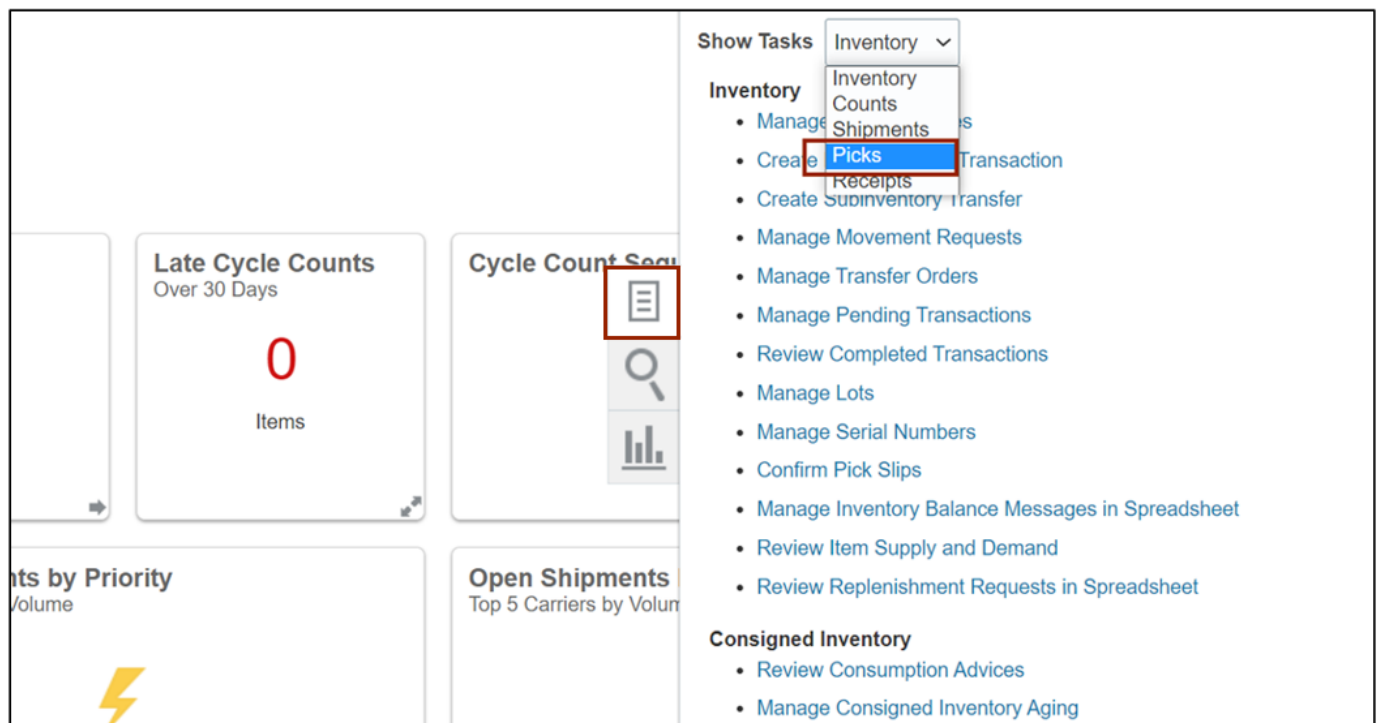


- On the **Inventory Management** page, click the **View by** [] icon and enter the **Organization ID**. Click the **Apply** button.



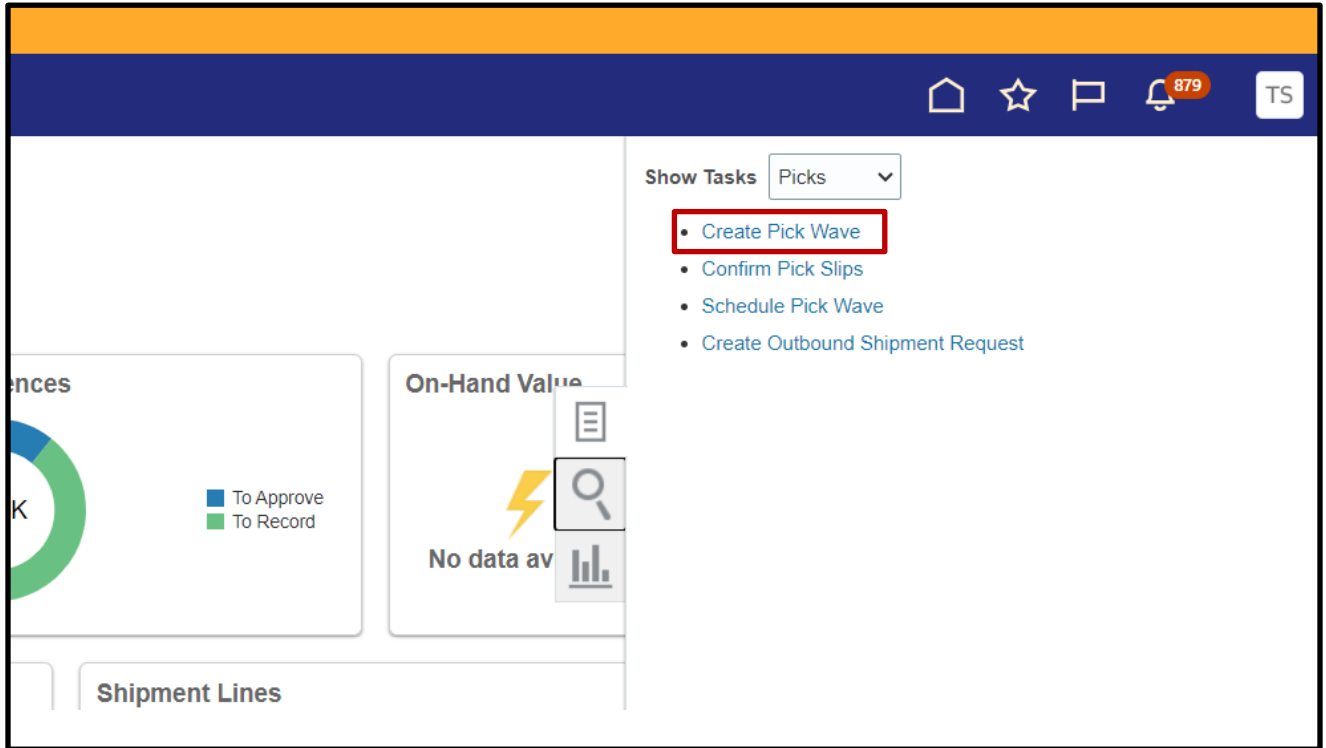
The screenshot shows the 'Inventory Management' dashboard for organization 4210451. It features several widgets: 'Picks' (3.02K), 'Late Cycle Counts' (156 Items), 'Cycle Count Sequences' (791), 'Open Shipments by Priority', 'Open Shipments by Carrier', and 'Shipment Lines' (455). A 'Select Organization' dialog box is open, showing '4210451' in the 'Inventory Organization' field and an 'Apply' button. A red box highlights the 'View by' icon in the top right corner of the dashboard.

- Click the **Tasks** [] icon and select **Picks** from the *Show Tasks* drop-down choice list.



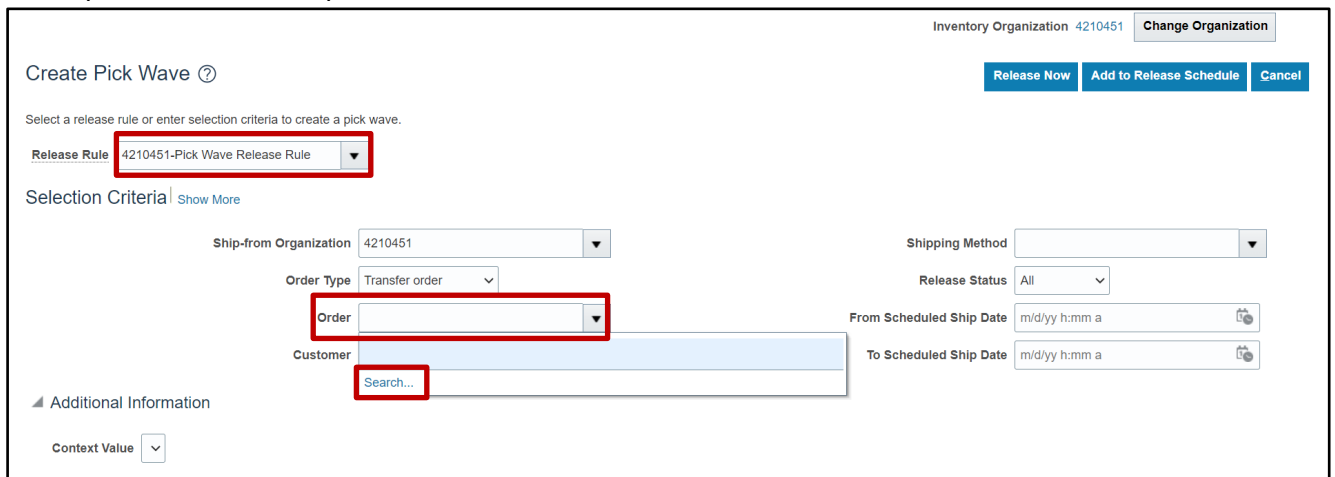
This screenshot shows the 'Show Tasks' dropdown menu open on the 'Inventory' section. The 'Picks' option is highlighted with a blue box. The menu lists various tasks such as 'Manage Shipments', 'Create Receipts', 'Manage Movement Requests', and 'Review Completed Transactions'. A red box highlights the 'Tasks' icon (a list icon) in the top right corner of the dashboard.

5. Click **Create Pick Wave**.



6. Choose the **Release Rule** for your Inventory Organization from the Drop-Down List.

7. Open the **Order** Drop-Down List and click **Search....**



8. Search for the order to be picked. The **Advanced** button will assist with searching partial information.

In this example, order 122033 was used. Click **Search**. In the search results section, click the order to select it then click **OK**.

Search and Select: Order ✕

▲ Search Advanced

Order

Customer

Shipment

Source Order

Search Reset

Order	Customer
122033	Training Super 2

OK Cancel

9. Click **Release Now**. The Pick Wave has been released for picking.

Inventory Organization 4210451 [Change Organization](#)

Create Pick Wave ⓘ

Select a release rule or enter selection criteria to create a pick wave.

Release Rule 4210451-Pick Wave Release Rule ▼

Selection Criteria [Show More](#)

Ship-from Organization 4210451 ▼

Order Type Transfer order ▼

Order 122033 ▼

Customer Training Super 2 🔍

Shipping Method ▼

Release Status All ▼

From Scheduled Ship Date m/d/yy h:mm a 🗓️

To Scheduled Ship Date m/d/yy h:mm a 🗓️

Release Now Add to Release Schedule Cancel

Schedule a Pick Wave

To schedule a pick wave in NCFs, please follow the steps below:

1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.

Good afternoon, Training Super User 1!


Sales Contract Management **Supply Chain Execution** Receivables Supply Chain Plan >

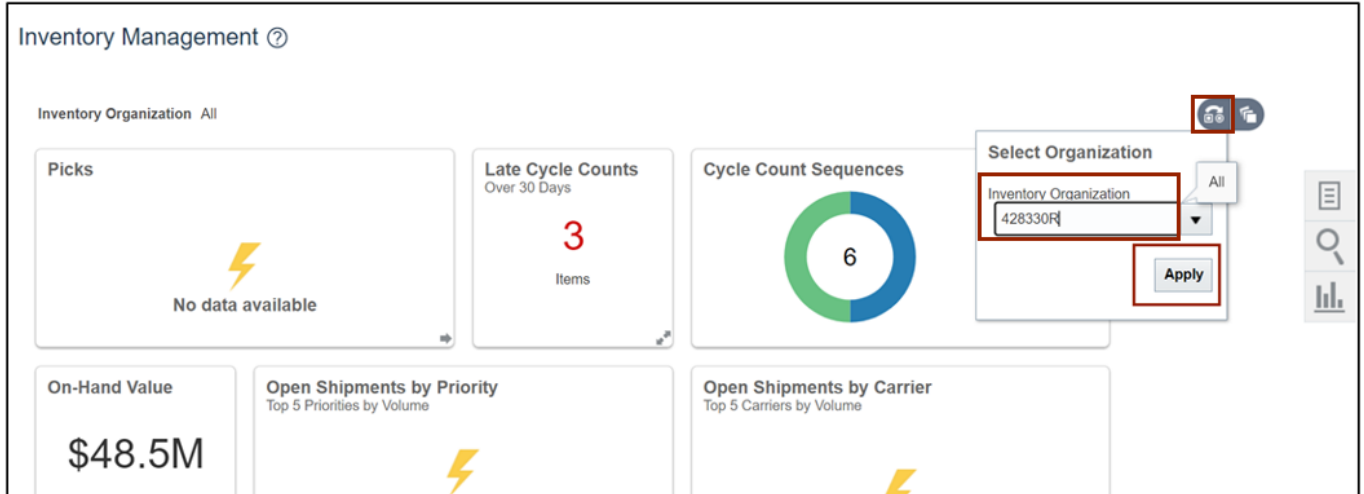
QUICK ACTIONS

- Manufacturing Work Definitions
- Manage Inspections
- Manage Quality Issues
- Manage Quality Actions
- Manage Problem Reports

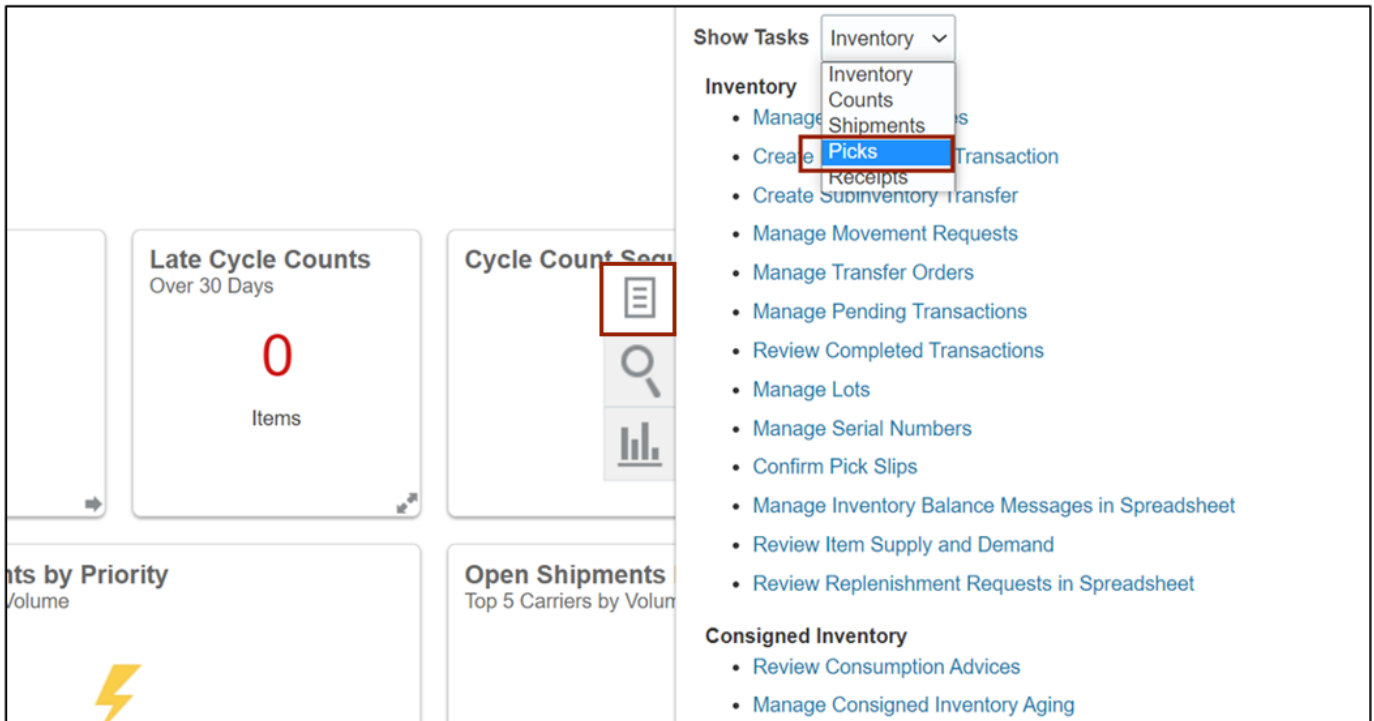
APPS

- Work Definition
- Quality Management
- Inventory Management**
- Cost Accounting
- Receipt Accounting
- Supply Orchestration

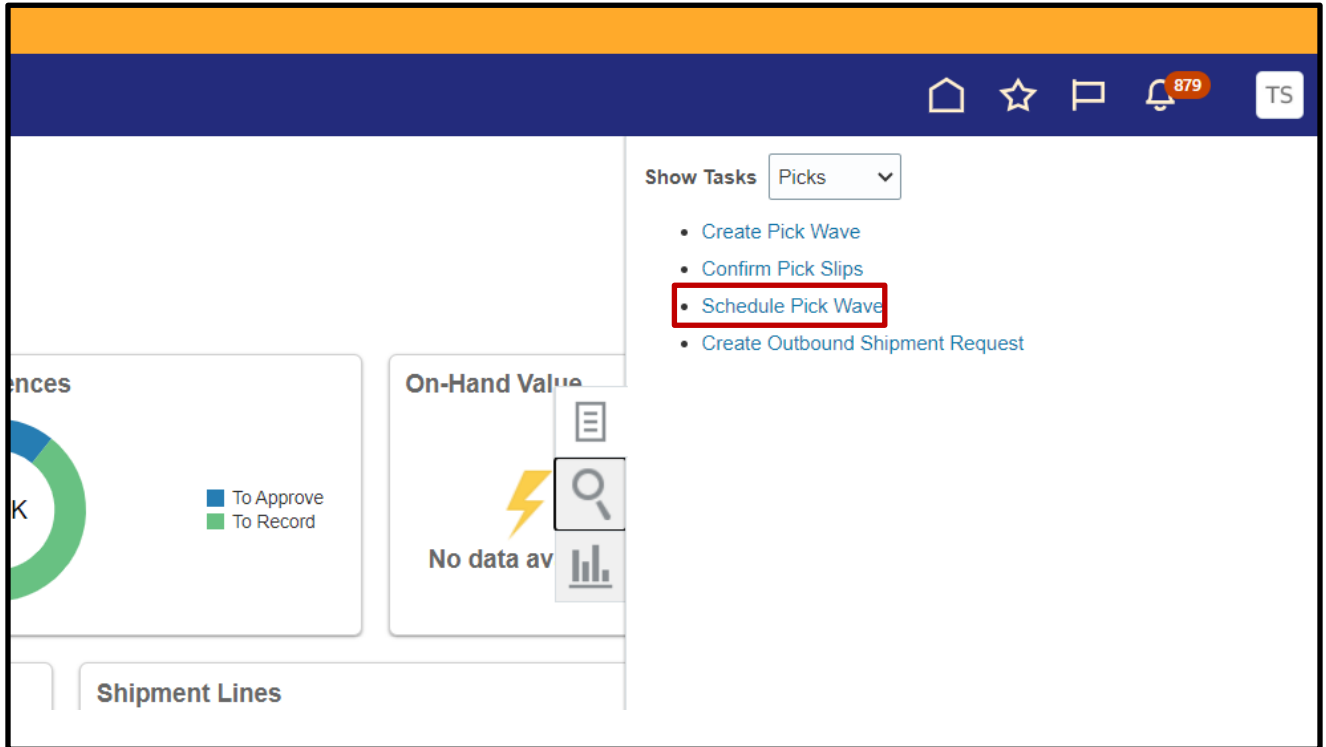
- On the **Inventory Management** page, click the **View by** [] icon and enter the **Organization ID**. Click the **Apply** button.



- Click the **Tasks** [] icon and select **Picks** from the *Show Tasks* drop-down choice list.



4. Click **Schedule Pick Wave**.



5. Choose the **Release Rule** for your Inventory Organization from the Drop-Down List.

Schedule Pick Wave

This process will be queued up for submission at position 1

Process Options Advanced Submit Cancel

Name Schedule Pick Wave

Description Create pick waves on a regular basis adhering t... Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

* Release Rule 428330R-Pick Wave Release Rule

Pick Wave Prefix

Actual Ship Date 428330R-Pick Wave Release Rule 428330R

Number of Child Processes

424150C-Pick Wave Release Rule	424150C
424150F-Pick Wave Release Rule	424150F
424150W-Pick Wave Release Rule	424150W
424151W-Pick Wave Release Rule	424151W
424170C-Pick Wave Release Rule	424170C
424170F-Pick Wave Release Rule	424170F
424170W-Pick Wave Release Rule	424170W

Search...

6. Switch to the Advanced view by clicking **Advanced**.

Schedule Pick Wave

This process will be queued up for submission at position 1

Process Options **Advanced** Submit Cancel

Name Schedule Pick Wave

Description Create pick waves on a regular basis adhering t... Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

* Release Rule 428330R-Pick Wave Release Rule


Pick Wave Prefix

Actual Ship Date m/d/yy

Number of Child Processes

7. Click the **Schedule** tab.

Schedule Pick Wave

 This process will be queued up for submission at position 1

Process Options **Basic** **Submit** **Cancel**

Name Schedule Pick Wave

Description Create pick waves on a regular basis adhering t... Notify me when this process ends


Schedule As soon as possible **Submission Notes**

Advanced Options

Parameters **Schedule** Notification

*** Release Rule** 428330R-Pick Wave Release Rule ▼

Pick Wave Prefix

Actual Ship Date m/d/yy 

Number of Child Processes

- Click the **Using a schedule** radio button and choose the frequency from the Frequency drop-down list.

In this example, Daily was chosen.

Schedule Pick Wave

i This process will be queued up for submission at position 1

Process Options Basic Submit Cancel

Name Schedule Pick Wave

Description Create pick waves on a regular basis adhering t... Notify me when this process ends

Schedule Using a schedule Submission Notes

Advanced Options

Parameters **Schedule** Notification

Run As soon as possible
 Using a schedule

Frequency **Once** ▾
Once
Hourly/Minute
Daily
Weekly
Monthly
Yearly
User-Defined
Use a Saved Schedule

* Start Date (UTC-05:00) New York - Eastern Time (ET)

9. Enter your Start and End Dates.

In this example, an end date of 2099 was chosen.

Advanced Options

Parameters **Schedule** Notification

Run As soon as possible
 Using a schedule

Frequency

Days Between Runs

* Start Date (UTC-05:00) New York - Eastern Time (ET)

* End Date (UTC-05:00) New York - Eastern Time (ET)

Note: Change other options as necessary before moving onto the next step.

10. Click **Submit** to schedule your Pick Wave.

Schedule Pick Wave

This process will be queued up for submission at position 1

Name Schedule Pick Wave

Description Create pick waves on a regular basis adhering t... Notify me when this process ends

Schedule Using a schedule Submission Notes

Advanced Options

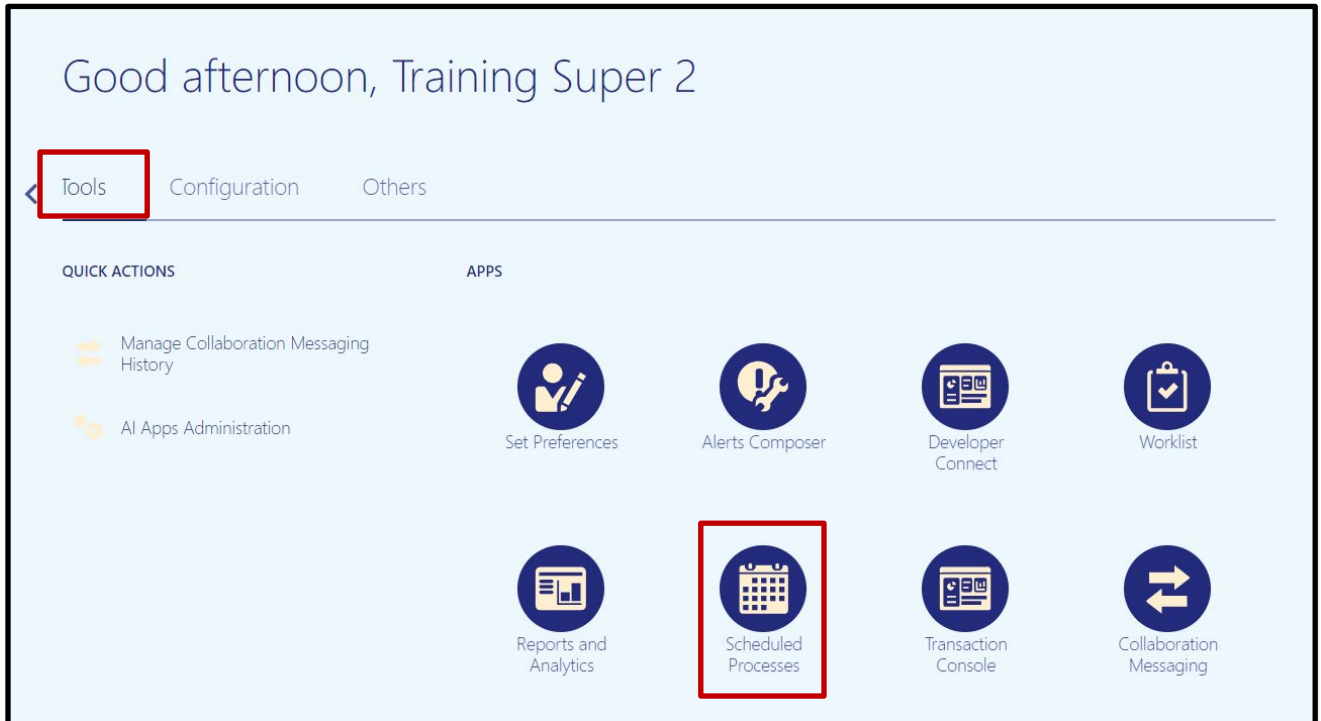
Parameters **Schedule** Notification

Run As soon as possible
 Using a schedule

Generate Pick Slip Report

To generate a pick slip report in NCFS, please follow the steps below:

1. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.



2. On the **Scheduled Processes** page, click **Scheduled New Process**.

Overview ?

▶ Search

Search Results ?

View Flat List Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Provide Online Transaction Engine Functionality

3. Type *“Print Pick Slip Report”* in the **Name** field. Click **OK**.

Schedule New Process

Type Job Job Set

Name

Description Provides information for picks and the corresponding details for pick slip.

OK Cancel

4. Choose *Released to warehouse* from the **Line Status to Print** drop-down list. Choose *Both* from the **Item Display** drop-down list. Choose the Inventory Organization from the **Ship-from Organization** drop-down list.
5. Click **Submit**.

Process Details ✕

ⓘ This process will be queued up for submission at position 1

Name Print Pick Slip Report Print output ▼

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

Ship-from Organization 4210451 ▼

From Pick Slip ▼

To Pick Slip ▼

Shipping Method ▼

From Order ▼

To Order ▼

From Movement Request ▼

To Movement Request ▼

Customer ▼

*** Line Status to Print** Released to warehouse ▼

*** Item Display** Both ▼



6. Click the **Refresh** button [] until the Print Pick Slip Report status shows as Succeeded.


Overview 

Search


Saved Search Last hour


Search Results 

View Flat List Hierarchy

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log 

Name	Process ID	Status	Scheduled Time	Submission Time
Print Pick Slip Report	2680511	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680510	Wait	10/9/23 9:40 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680509	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680508	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT

7. Click the **Print Pick Slip Report** line Under the **Process Details** tab, click the **Republish** icon [].

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log 

Name	Process ID	Status	Scheduled Time	Submission Time
Print Pick Slip Report	2680511	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680510	Wait	10/9/23 9:40 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680509	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT
Rebuild Learning Item Stop Word Index	2680508	Succeeded	10/9/23 9:35 AM EDT	10/9/23 9:35 AM EDT




Process Details Status Details

Print Pick Slip Report, 2680511


Status Succeeded Schedule Start 10/9/23 9:36 AM EDT External Job Type BIP Job External Job Status NA

Log Attachment ESS_I_2680511 Output

Output & Delivery

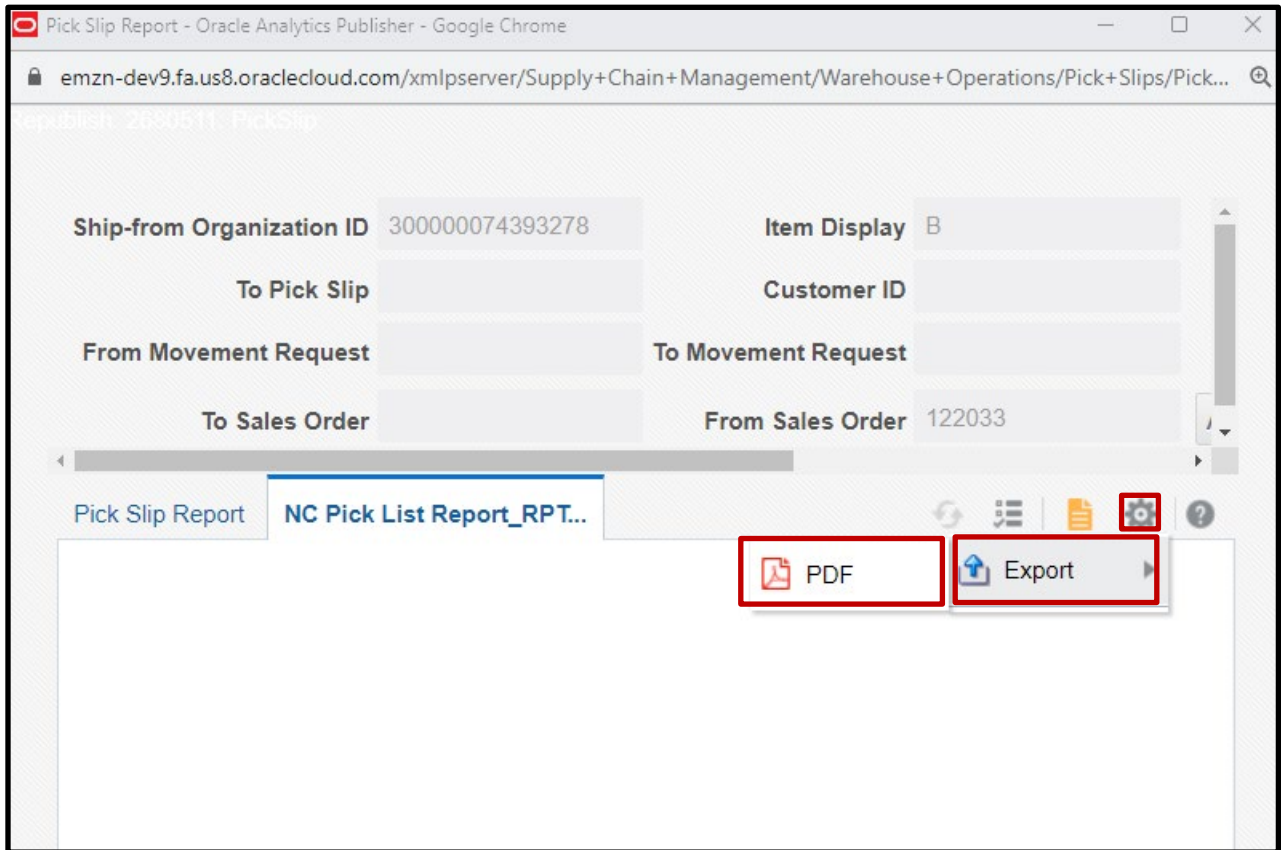
XML Data  Diagnostic Log  Republish 

Status All

Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send
Default Document	NC Pick List Report_RPTIN015	PDF	English (United States)	(UTC-05:00) New York - Eastern Time (ET)		✔	

Parameters

8. The **Print Slip Report** pop-up will appear. Click the **Actions** button [⚙️]. Mouse over the **Export** list and click **PDF**.
9. Open and view the output.



8. Click the **Actions** icon and select **Export**. Select the format (PDF) to get the report output.

9. Open and view the Output.

Process Details ✕

i This process will be queued up for submission at position 1

Process Options Basic Submit Cancel

Name Print Pick Slip Report

Description Provides information for picks and the correspo...

Schedule Using a schedule

Submission Notes

Print output Check P ▼

Notify me when this process ends

Advanced Options

Parameters Schedule Output Notification

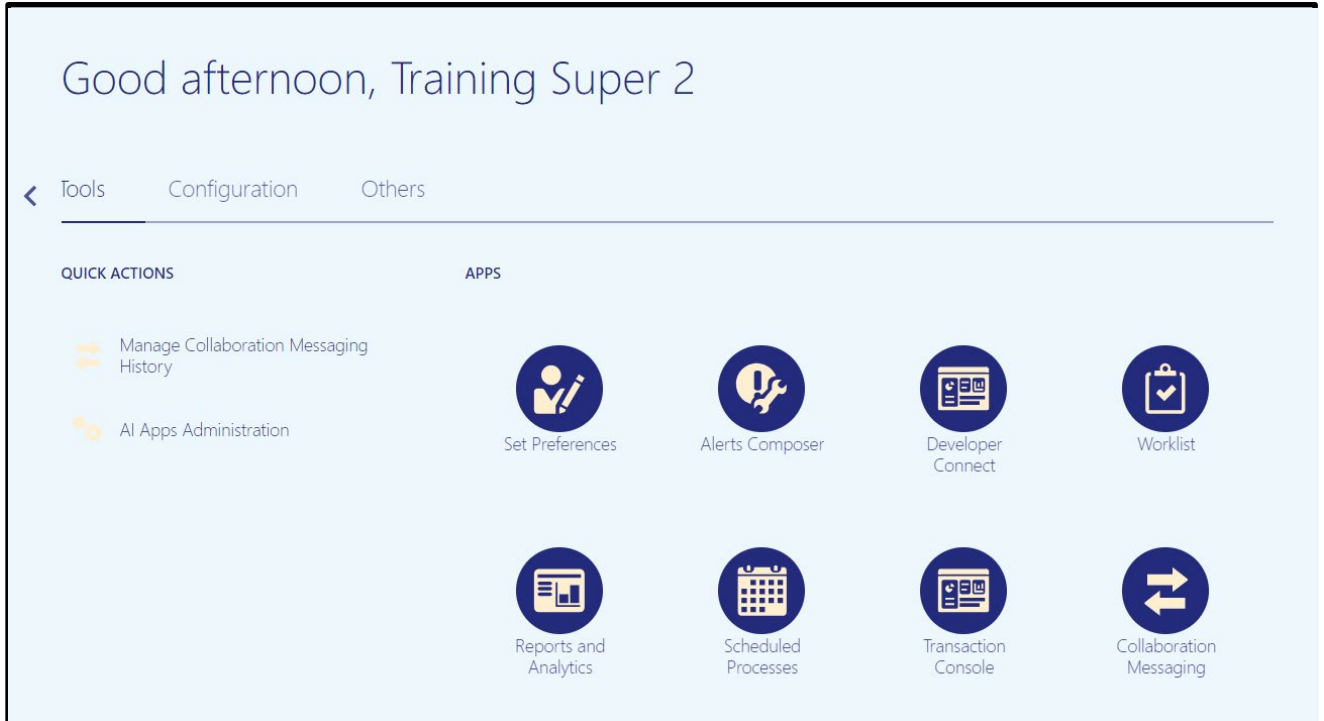
Run As soon as possible

Using a schedule

Schedule Pick Slip Report

To schedule a pick slip report in NCFS, please follow the steps below:

1. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.



2. On the **Scheduled Processes** page, click **Scheduled New Process**.

Overview ?

▶ Search

Search Results ?

View Flat List Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Provide Online Transaction Engine Functionality

3. Type *“Print Pick Slip Report”* in the **Name** field. Click **OK**.

Schedule New Process

Type Job Job Set

Name

Description Provides information for picks and the corresponding details for pick slip.

OK Cancel

4. Choose *All* from the **Line Status to Print** drop-down list. Choose *Both* from the **Item Display** drop-down list. Choose the Inventory Organization from the **Ship-from Organization** drop-down list.

Process Details

i This process will be queued up for submission at position 1

Process Options | **Advanced** | **Submit** | **Cancel**

Name Print Pick Slip Report Print output

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

Ship-from Organization 428330R

From Pick Slip

To Pick Slip

Shipping Method

From Order

To Order

From Movement Request

To Movement Request

Customer

* **Line Status to Print** All

* **Item Display** Both



5. Switch to the Advanced view by clicking **Advanced**.

Process Details

i This process will be queued up for submission at position 1

Name Print Pick Slip Report Print output ▼

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Basic Options

Parameters

Ship-from Organization ▼

6. Click the **Schedule** tab.

Process Details

i This process will be queued up for submission at position 1

Name Print Pick Slip Report Print output ▼

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Advanced Options

Parameters Output Notification

Ship-from Organization ▼

7. Click the **Using a schedule** radio button. Choose the frequency from the **Frequency** drop-down list.

In this example, Daily was chosen.

The screenshot shows the 'Advanced Options' configuration page with the 'Schedule' tab selected. Under the 'Run' section, the 'Using a schedule' radio button is selected. The 'Frequency' dropdown menu is open, displaying options: Once, Hourly/Minute, Daily (highlighted), Weekly, Monthly, Yearly, User-Defined, and Use a Saved Schedule. The '* Start Date' field is empty. The time zone is set to '(UTC-05:00) New York - Eastern Time (ET)'.

8. Enter your Start and End Dates.

In this example, an end date of 2099 was chosen.

Advanced Options

Parameters **Schedule** Output Notification

Run As soon as possible
 Using a schedule

Frequency

Days Between Runs

* Start Date (UTC-05:00) New York - Eastern Time (ET)

* End Date (UTC-05:00) New York - Eastern Time (ET)

- Click the **Output** tab to determine output location. Click **Add Output Document**.

Process Details

i This process will be queued up for submission at position 1

Process Options | Basic | Submit | Cancel

Name Print Pick Slip Report Print output Check P v

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule Using a schedule **Submission Notes**

Advanced Options

Parameters | Schedule | Output | Notification

View ▼ + ✕ ?

Name	Add Output Document	Layout	Format
No document defined			

- Use **Name** field to name your output. Click **Add Destination** to choose a destination and complete relevant fields.

Advanced Options

Parameters Schedule **Output** Notification

View ▾ + × ?

Name	Layout	Format
Example Pick Slip	NC Pick List R ▾	PDF ▾

WshPickSlipBIPJob Document2: Destinations

+ Add Destination ▾

- Printer
- E-Mail**
- Fax
- Content Server

- Click **Submit** to schedule your pick slip report.

Process Details [X]

i This process will be queued up for submission at position 1

Process Options Basic **Submit** Cancel

Name Print Pick Slip Report Print output Check P ▾

Description Provides information for picks and the correspo... Notify me when this process ends

Schedule Using a schedule **Submission Notes** [Text Box]

Advanced Options

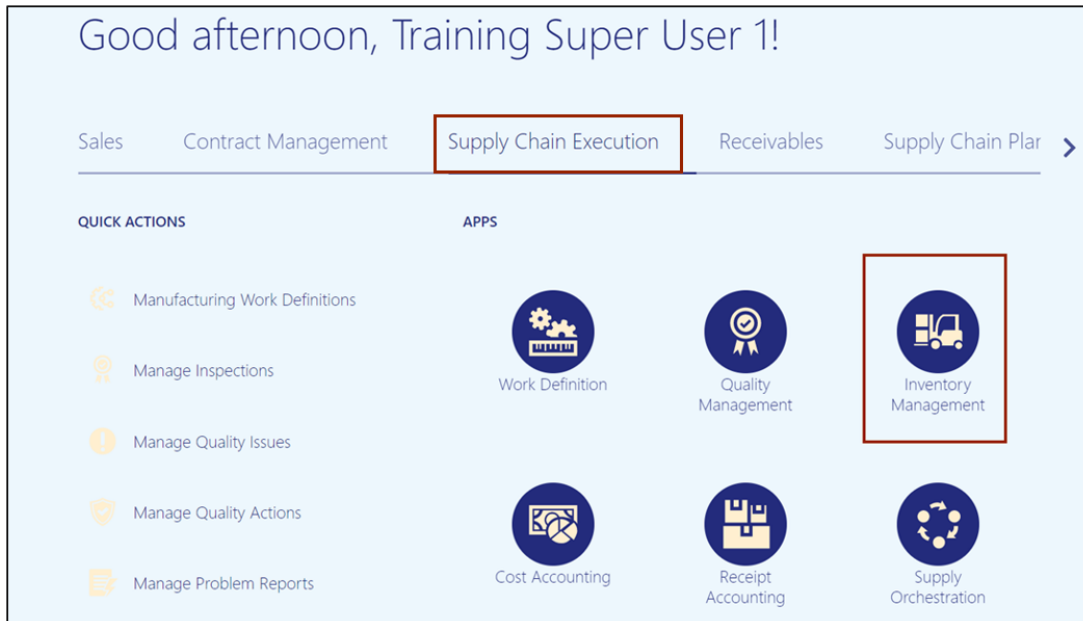
Parameters **Schedule** Output Notification

Run As soon as possible Using a schedule

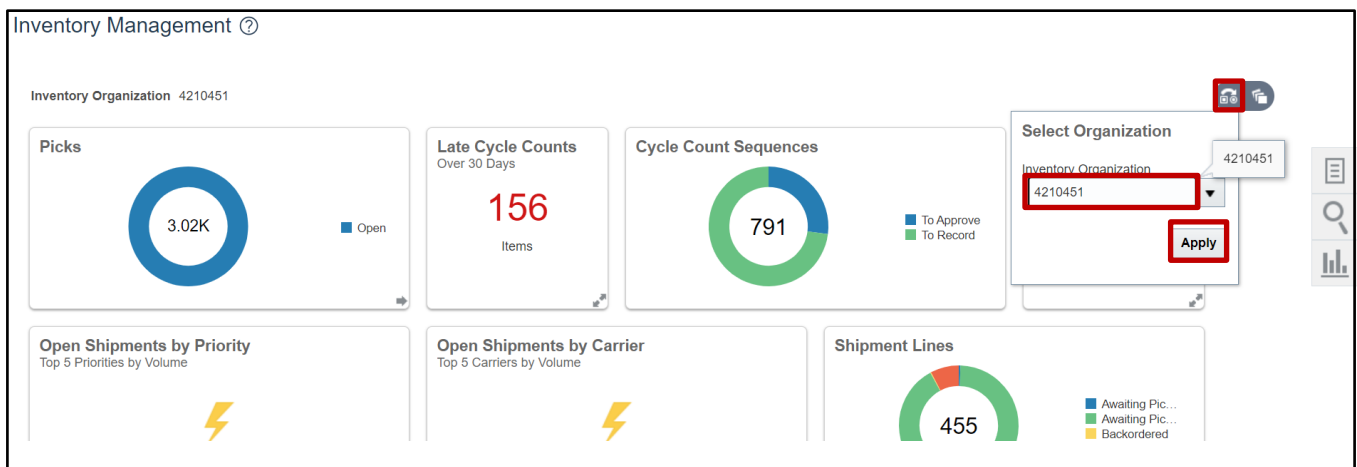
Confirm Pick Slips

To Approve Customer Orders in NCFs, please follow the steps below:

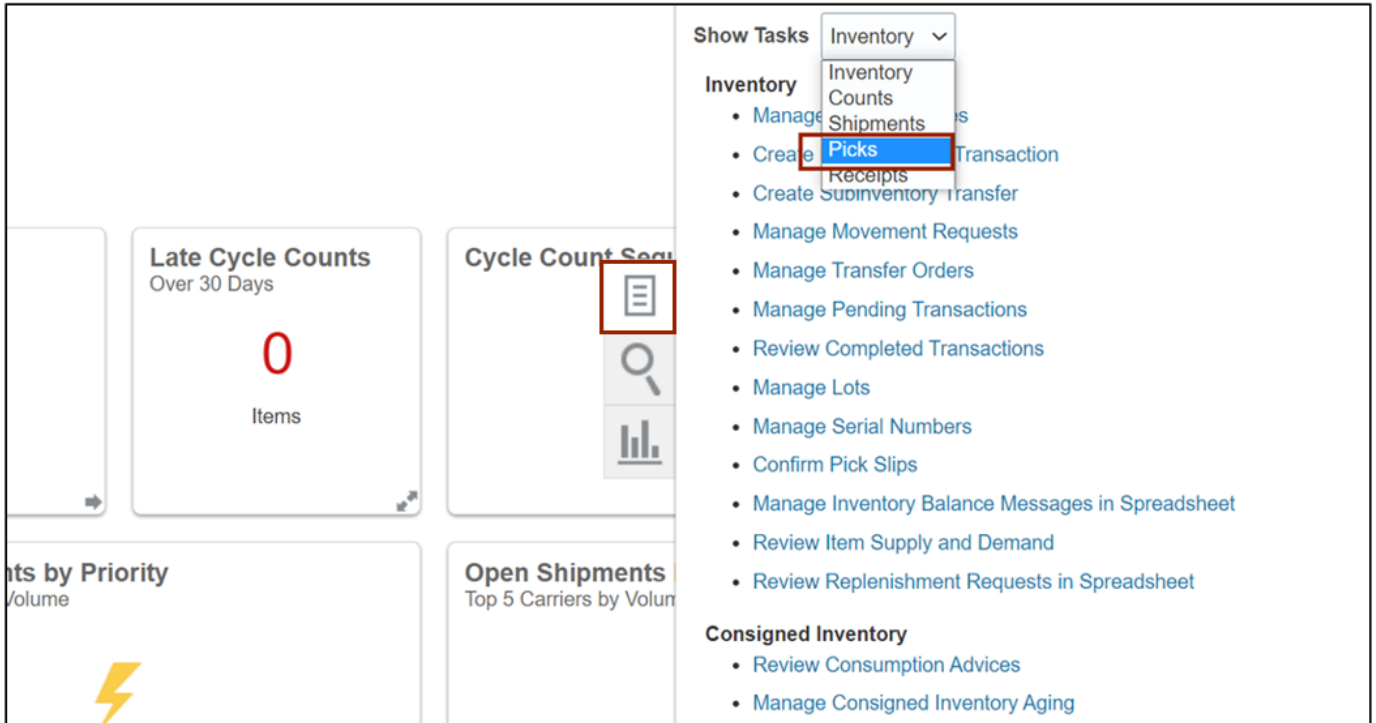
1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.



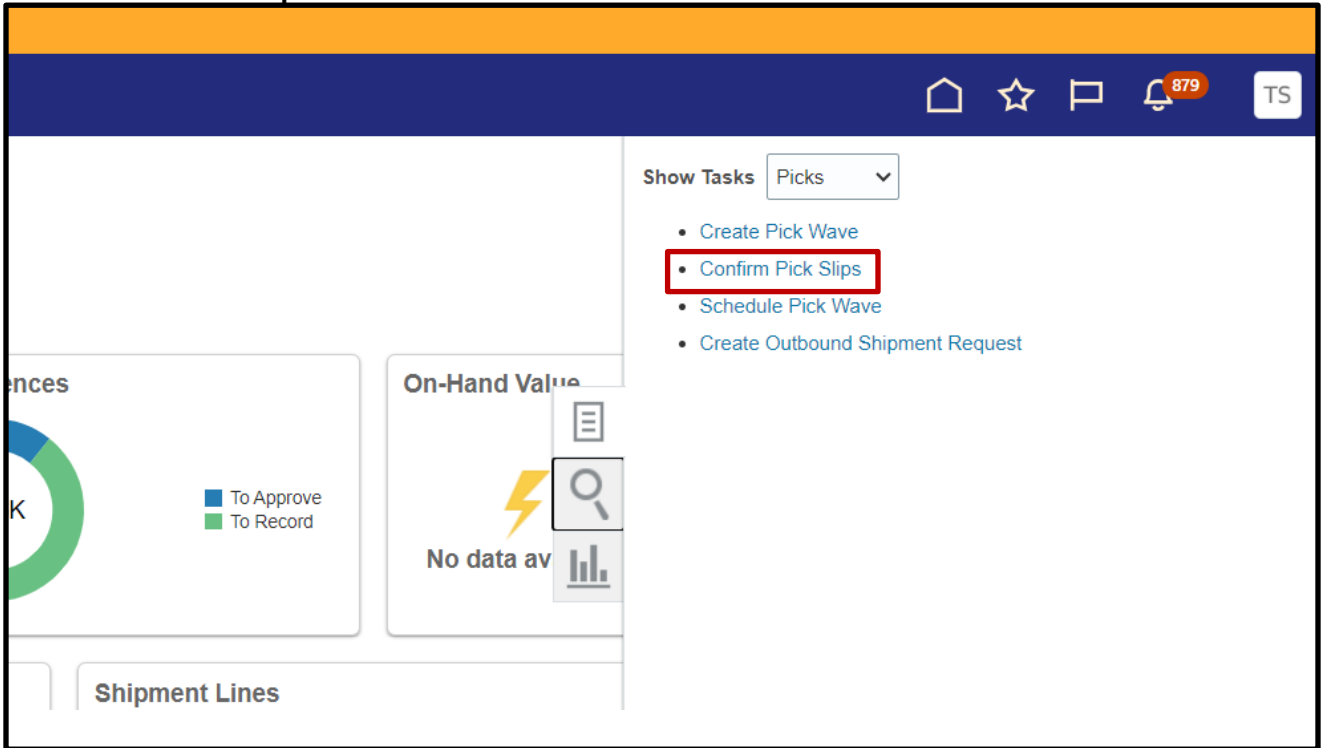
2. On the **Inventory Management** page, click the **View by** [📄] icon and enter the **Organization ID**. Click the **Apply** button.



3. Click the **Tasks** [] icon and select **Picks** from the *Show Tasks* drop-down choice list.

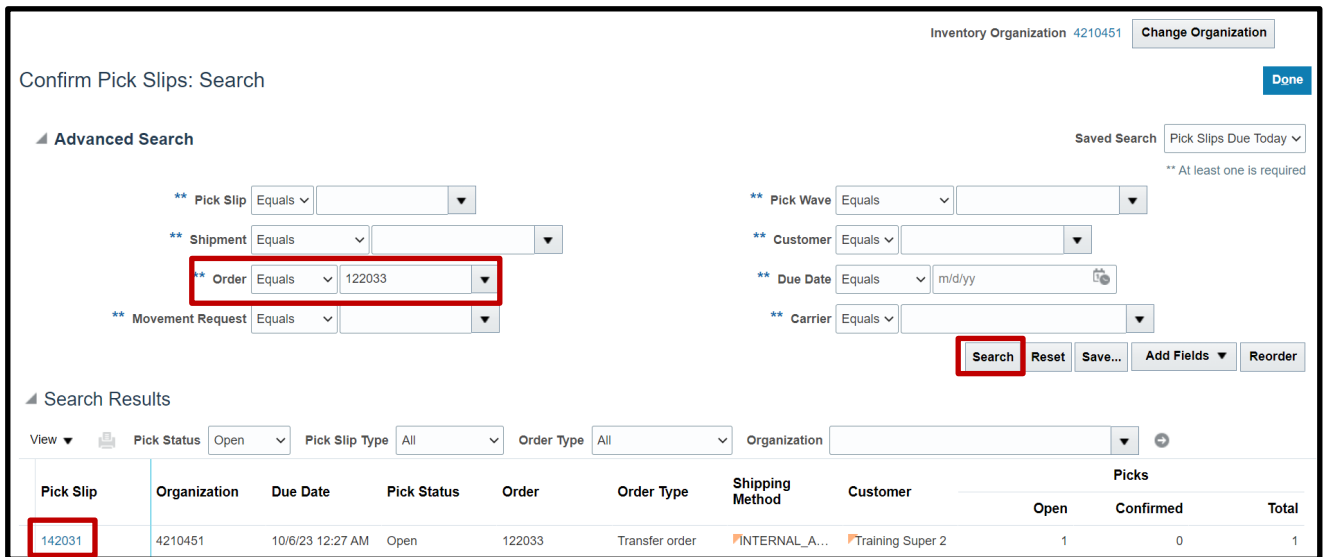


4. Click **Confirm Pick Slip**.

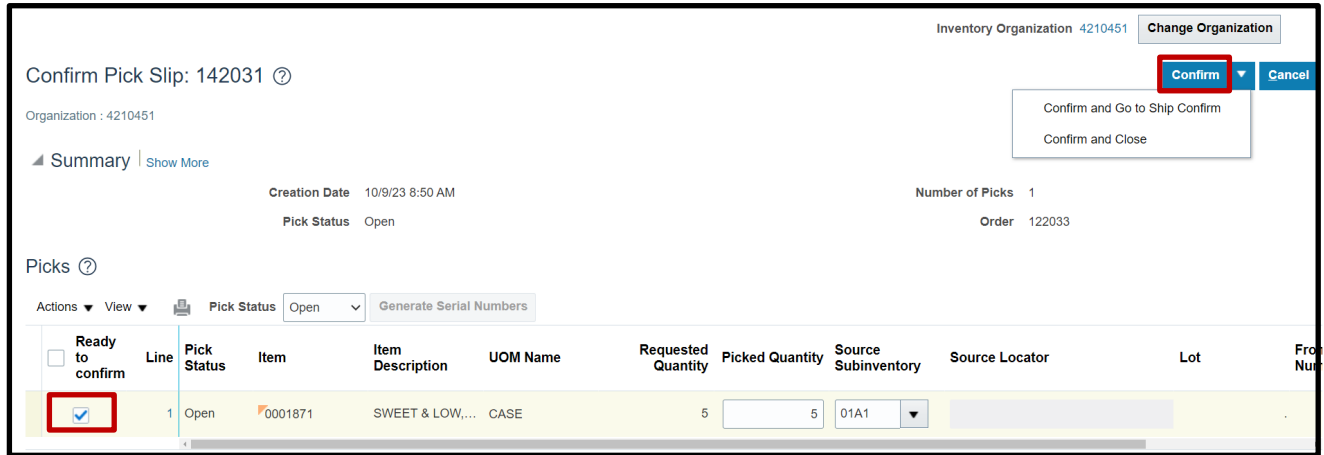


5. Use the search fields to find the pick wave. In this example, the Order number 122033 was searched by using the **Order** field. Click **Search** to view the results.

6. Click the **Pick Slip Number** link to go to the **Confirm Pick Slip** page.



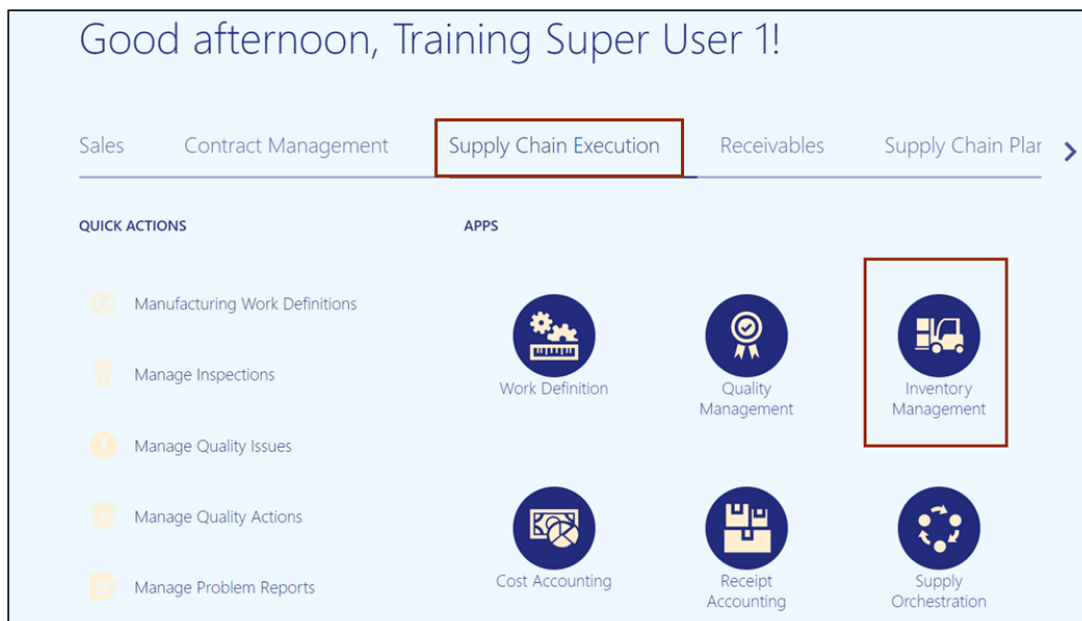
7. Make any changes to the pick lines. Click the **Ready to Confirm** check box. Click **Confirm**. You can click **Confirm and Go to Ship Confirm** by using the Drop-Down List to go directly to Ship Confirm.




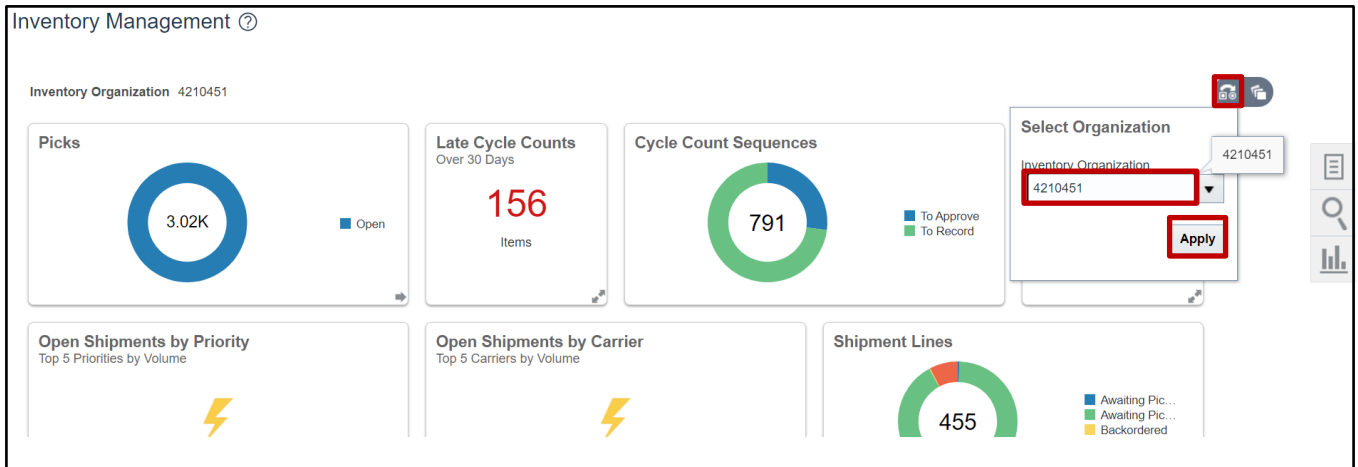
Ship Confirm a Pick

To Ship Confirm a Pick in NCFS, please follow the steps below:

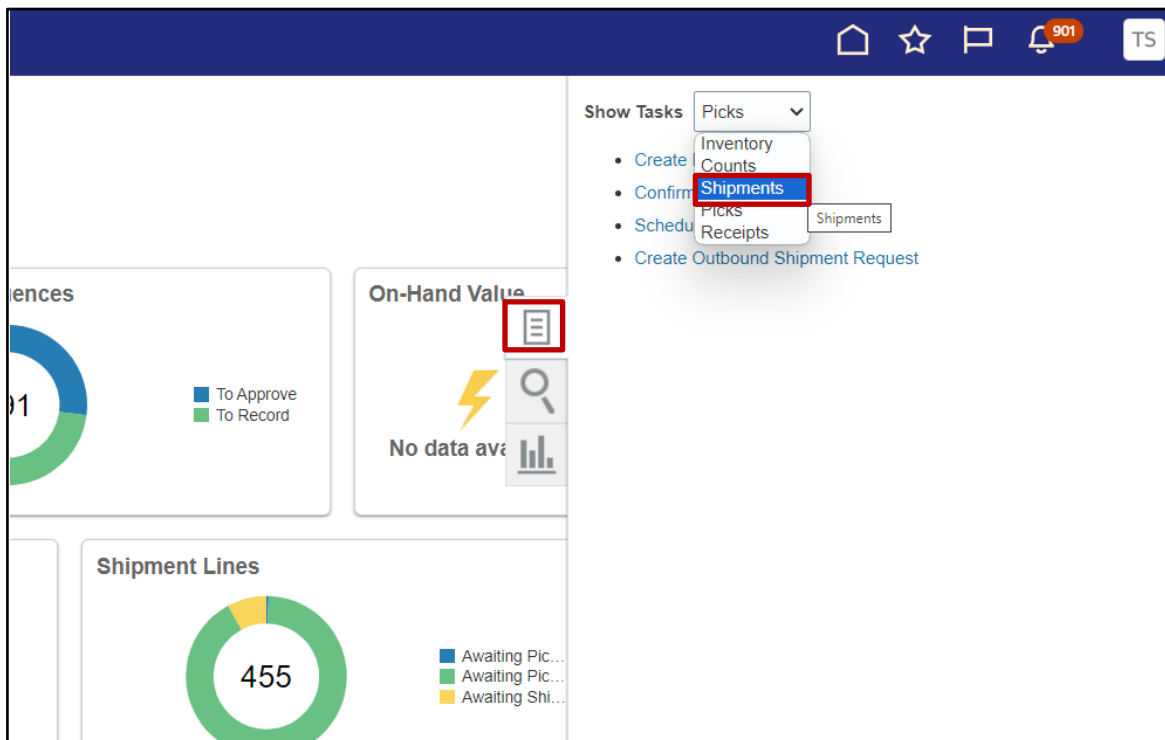
1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.



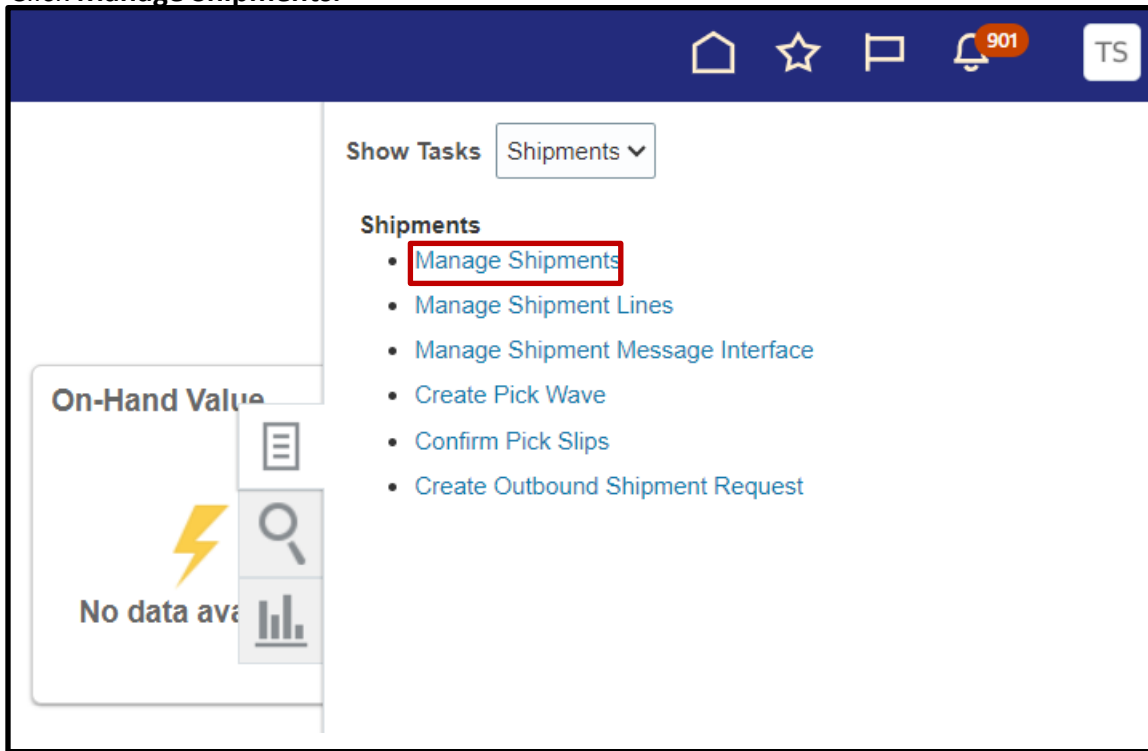
- On the **Inventory Management** page, click the **View by** [] icon and enter the **Organization ID**. Click the **Apply** button.



- Click the **Tasks** [] icon and select **Shipments** from the *Show Tasks* drop-down choice list.

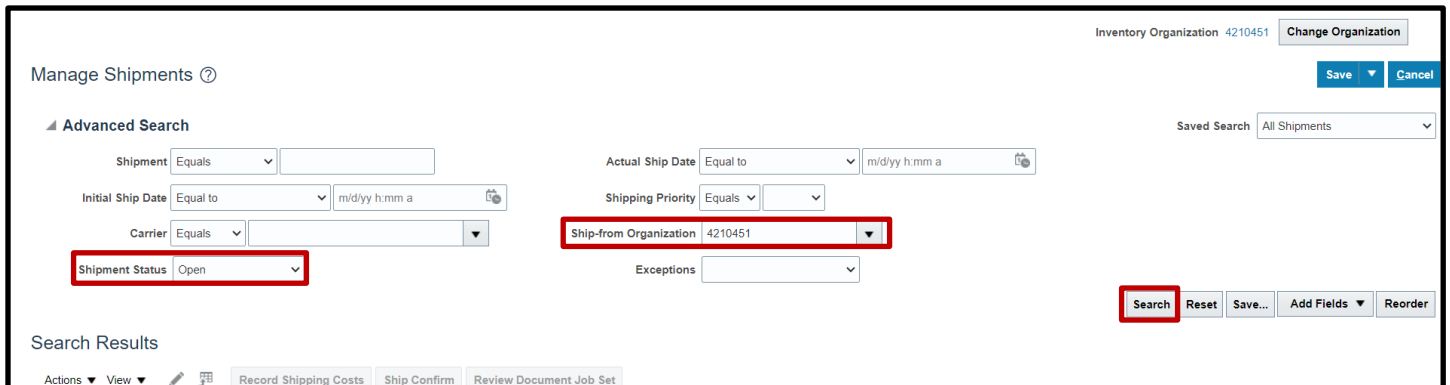


4. Click **Manage Shipments**.



5. Use the search fields to search for the order to be Ship Confirmed.

In this example, open orders for Inventory Organization 4210451 were searched. Click **Search**.



6. Click the **Shipment** number.

Search Results

Actions ▾ View ▾ **Record Shipping Costs** **Ship Confirm** **Review Document Job Set**

Summary | Carrier | Shipping Cost | Other

Shipment	Summary						
	Ship-to Location	Shipment Status	Initial Ship Date	Bill of Lading	Gross Weight	Weight UOM	Trans Shipm
100044	424860C-22385 MCGRIT BRIDGE R	Open	9/20/23 10:4			milligram	
100048	423060F-701 STEVENS MILL RD	Open	10/10/23 8:0			milligram	
100049	423060F-701 STEVENS MILL RD	Open	10/10/23 8:0			milligram	

7. On the **Edit Shipment** page, make any necessary changes then click **Ship Confirm**.

Edit Shipment: 100044 ⓘ

Inventory Organization: 4210451 [Change Organization](#)

Shipment 100044 **Ship Confirm** **Actions** **Save** **Cancel**

Shipment

Shipment: 100044

Shipping Method:

Waybill:

Initial Ship Date: 9/20/23 10:49 AM

Gross Weight:

Weight UOM: milligram

Volume:

Volume UOM: millilitre

Shipment Status: Open

Exceptions in Shipment: 0

Ship-from Organization: 4210451

Customer: 424860C-22385 MCGRIT BRIDGE ROAD

Ship-to Location: 424860C-22385 MCGRIT BRIDGE ROAD

Total Shipping Cost Recorded: 0.00 USD

Number of Items: 1

Number of Outer Packing Units: 0

[Show Details](#)

Lines

Wrap-Up

This QRG covers the pick wave process for inventory agencies using NCFS. The pick wave process is used for Self-Service Procurement (SSP) orders for consumption or Transfer Orders for replenishment and warehouse movement. Not all transactions use the pick wave process, such as the NC Direct Issue miscellaneous transaction; see **INV-16** for more information found here: <https://www.osc.nc.gov/training/ncfs-help-documents>.

Additional Resources

- INV 103: Warehouse Staff (WBT)
- INV 105: Inventory Management (ILT)
- INV 106: Warehouse Transactions (ILT)
- INV-14, INV-18, INV-34, and INV-35: <https://www.osc.nc.gov/training/ncfs-help-documents> (QRG)